



Indiana Pro Bono Commission  
One Indiana Square, Suite 530  
Indianapolis, IN 46204

Indiana Bar Foundation  
230 East Ohio Street, Suite 200  
Indianapolis, IN 46204

## COMBINED 2004 DISTRICT REPORT, 2006 PRO BONO GRANT APPLICATION, AND 2006 PLAN

Pro Bono District 14

Applicant: AMY W. ROTH

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E-mail address: probono14@earthlink.net Website address: N/A

Judicial Appointee: J. TERRENCE CODY

Plan Administrator: AMY W. ROTH

Names of Counties served: CLARK, CRAWFORD, FLOYD, HARRISON, ORANGE,  
SCOTT, WASHINGTON

Percentage of volunteer attorneys (as defined on page 6) *who accepted a pro bono case in 2004*  
per registered attorneys in district, i.e. the district's pro bono participation rate: **22.1%.**  
To the extent the pro bono participation rate information is available by county, please  
provide below. Clark: 17.4%; Crawford: 0%; Floyd: 27.3%; Harrison: 16.7%; Orange: 0;  
Scott: 26.7%; Washington: 42.1%.

Amount of grant received for 2005: \$17,000

Amount of grant (2004 & prior years) projected to be unused as of 12/31/05: 0

Amount requested for 2006: \$25,500

**The following representations**, made to the best of our knowledge and belief, are being provided to the Indiana Pro Bono Commission and Indiana Bar Foundation in anticipation of their review and evaluation of our funding request and our commitment and value to our Pro Bono District.

**Operation under Rule 6.6**

In submitting this application for funding, this district is representing itself as having a Pro Bono Plan, which is pursuant to **Rule 6.6** of the Indiana Rules of Professional Conduct. The plan enables attorneys in our district to discharge their professional responsibilities to provide civil legal pro bono services; improves the overall delivery of civil legal services to persons of limited means by facilitating the integration and coordination of services provided by pro bono organizations and other legal assistance organizations in our district; and ensures access to high quality and timely pro bono civil legal services for persons of limited means by (1) fostering the development of new civil legal pro bono programs where needed and (2) supporting and improving the quality of existing civil legal pro bono programs. The plan also fosters the growth of a public service culture within the district which values civil legal pro bono publico service and promotes the ongoing development of financial and other resources for civil legal pro bono organizations.

We have adhered to **Rule 6.6** (f) by having a district pro bono committee composed of:

- A. the judge designated by the Supreme Court to preside;
- B. to the extent feasible, one or more representatives from each voluntary bar association in the district, one representative from each pro bono and legal assistance provider in the district, and one representative from each law school in the district; and
- C. at least two (2) community-at-large representatives, one of whom shall be a present or past recipient of pro bono publico legal services.

We have determined the governance of our district pro bono committee as well as the terms of service of our members. Replacement and succession members are appointed by the judge designated by the Supreme Court.

Pursuant to **Rule 6.6** (g) to ensure an active and effective district pro bono program, we:

- A. prepare in written form, on an annual basis, a district pro bono plan, including any county sub-plans if appropriate, after evaluating the needs of the district and making a determination of presently available pro bono services;
- B. select and employ a plan administrator to provide the necessary coordination and administrative support for the district pro bono committee;
- C. implement the district pro bono plan and monitor its results; and
- D. submit an annual report to the Commission.

## **Commitment to Pro Bono Program Excellence**

We also understand that ultimately the measure of success for a civil legal services program, whether a staffed or volunteer attorney program, is the outcomes achieved for clients, and the relationship of these outcomes to clients' most critical legal needs. We agree to strive for the following hallmarks which are characteristics enhancing a pro bono program's ability to succeed in providing effective services addressing clients' critical needs.

**1. Participation by the local bar associations and attorneys.** The associations and attorneys believe the program is necessary and beneficial.

**2. Centrality of client needs.** The mission of the program is to provide high quality free civil legal services to low-income persons through volunteer attorneys. Client needs drive the program, balanced by the nature and quantity of resources available.

**3. Program priorities.** The program engages in a priority-setting process, which determines what types of problems the program will address. Resources are allocated to matters of greatest impact on the client and are susceptible to civil legal resolution. The program calls on civil legal providers and other programs serving low-income people to assist in this process.

**4. Direct representation component.** The core of the program is direct representation in which volunteer attorneys engage in advocacy on behalf of low-income persons. Adjunct programs such as advice clinics, pro se clinics and paralegal assistance are dictated by client needs and support the core program.

**5. Coordination with state and local civil legal providers and bar associations.** The programs work cooperatively with the local civil legal providers. The partnerships between the civil legal providers and the local bar association results in a variety of benefits including sharing of expertise, coordination of services, and creative solutions to problems faced by the client community.

**6. Accountability.** The program has mechanisms for evaluating the quality of service it provides. It expects and obtains reporting from participating attorneys concerning the progress/outcome of referred cases. It has the capability to demonstrate compliance with requirements imposed by its funding source(s), and it has a grievance procedure for the internal resolution of disputes between attorneys and clients.

**7. Continuity.** The program has a form of governance, which ensures the program will survive changes in bar leadership, and has operational guidelines, which enable the program to survive a change in staff.

**8. Cost-effectiveness.** The program maximizes the level of high quality civil legal services it provides in relationship to the total amount of funding received.

**9. Minimization of barriers.** The program addresses in a deliberate manner linguistic, sensory, physical and cultural barriers to clients' ability to receive services from the program. The program does not create undue administrative barriers to client access.

**10. Understanding of ethical considerations.** The program operates in a way which is consistent with the Rules of Professional Conduct; client confidentiality is assured and conflicts of interest are avoided. The staff and volunteers are respectful of clients and sensitive to their needs.

**11. ABA Standards.** The program is designed to be as consistent with the ABA Standards for Programs Providing Civil Pro Bono Legal Services to Persons of Limited Means as possible.

No events, shortages or irregularities have occurred and no facts have been discovered which would make the financial statements provided to you materially inaccurate or misleading. To our knowledge there is nothing reflecting unfavorably upon the honesty or integrity of members of our organization. We have accounted for all known or anticipated operating revenue and expense in preparing our funding request.

We agree to provide human-interest stories promoting Pro Bono activities in a timely manner upon request of the Indiana Bar Foundation or Indiana Pro Bono Commission. We further agree to make ourselves available to meet with the Pro Bono Commission and/or the Indiana Bar Foundation to answer any questions or provide any material requested which serves as verification/source documentation for the submitted information.

**Explanation of items stricken from the above Letter of Representation:**

**It is understood that this Letter does not replace the Grant Agreement or other documents required by the Indiana Bar Foundation or Indiana Pro Bono Commission.**

**Signatures:**

\_\_\_\_\_  
**Judicial Appointee Signature**

\_\_\_\_\_  
**Date**

\_\_\_\_\_  
**Plan Administrator Signature**

\_\_\_\_\_  
**Date**

## 2006 PLAN SUMMARY

1. Please write a brief summary of the 2006 grant request. Please include information regarding your district's planned activities including committee meetings, training, attorney recognition, newspaper or magazine articles, marketing and promotion. The grant request should cover needs to be addressed, methods, target audience, anticipated outcomes, and how past difficulties will be addressed.

Legal Volunteers' board meets about every other month, but any issues that arise in the interim are handled by email consultation. In addition, there is a small group of attorneys available for consultation when less obvious legal issues arise needing clarification (the PA is not an attorney).

We have two major thrusts ongoing now and which will be important in 2006:

1. A developing coordination with the local abuse shelter. We plan a training session with their caseworkers to cover Legal Volunteers' policies, guidelines, general philosophy, in addition to procedural issues. This will streamline our efforts and save both time and trouble.
2. This approach dovetails nicely with another major effort, that of education of other agencies and churches in our community to train their point people on these same issues, and in addition, where other resources can be found. This will not only make for more efficiency for these advocates, but also go a step further toward helping the whole person.
3. Along with these two efforts goes a third, which is to develop off-site intake sessions, using churches and other agencies. All these initiatives will initially be confined to our "heavy duty" counties, and then move out into the other counties. The abuse shelter has caseworkers in five of the seven counties. Off-site work will make us more accessible and enhance our image in the community.

We have a committee working on attorney recognition. The Plan Administrator works hard at networking with the pro bono attorneys and relies heavily on email for this purpose. They are thanked often and sincerely.

One innovation still under development is that of asking attorneys to provide a "Brief Service" for clients whose legal problem is not clear, nor do they understand what direction they should take. This is a variant of "unbundling" and not new, but a different approach for this district. This is done by pre-arrangement and is understood by both sides to be for a single purpose.

The PA is attending meetings of the state-wide task force developing a grant application to submit for a substantial Federal grant in January. The idea of coordination of the legal resources and the abuse shelters has excited some real interest in the membership of that committee. This pro bono District has a high percentage of domestic violence applications, and it is impossible to meet all of the legal needs.

The PA has written an article for the Indiana Lawyer's Pro Bono insert (last year also, and as asked) on these initiatives.

Past and current difficulties are due in large part to the lack of money for staffing. With a PA who is not working full-time, and no other help, a number of things remain undone and will continue so. We manage to maintain small grants for litigation funds, but donations for program funds are not numerous, and there is no one on the board willing to take the time to solicit monies. The same comment could be made about fund-raising events; there are many ideas, but no doers. The Plan Administrator spends much time in case management, trying to help people.

Like most Districts, we have some really wonderful attorneys on the pro bono roster, and then of course there are some who are reluctant at best. They will take only one, very occasionally two, cases a year, and then have to be persuaded. These get the "light duty" cases, those that are less arduous and not so time-consuming. It helped us to have a CLE the end of 2004 and to give a reduced rate to those promising to do two pro bono family law cases in 2005.

**2004 REPORT OF VOLUNTEER ATTORNEY CASES IN DISTRICT \_\_14\_\_**

Please attach additional pages for each pro bono provider that receives IOLTA funding, whether directly or indirectly, in your district. See the sample additional pro bono provider page 6A. Please list each attorney only once in the volunteer attorney column but complete one line for each pro bono case for that attorney.

**Definitions:**

**Case:** A legal matter referred to and accepted by a pro bono attorney volunteer. This includes mediation and GAL services.

**Volunteer Attorney:** An attorney who has rendered pro bono service to at least one low-income client during the year or accepted a pro bono referral from the identified program. This does not include attorneys who are on the list of pro bono volunteers but who have never taken a case. The case numbers do not include cases screened, only cases actually referred to a pro bono attorney.

**Case Type:** Please use the abbreviations listed in Indiana Supreme Court Administrative Rule 8(B)(3) or any other defined abbreviation.

**Name of Pro Bono Provider** (includes legal service provider, court, plan administrator, bar association, and other organizations): **LEGAL VOLUNTEERS**

**IOLTA funding accounts for 54 % of total pro bono provider budget. Please state the percentage of volunteers and cases which are attributable to IOLTA funding: 54%. If this percentage is substantially more than the percentage of IOLTA funding, please explain.**

Volunteer Attorney Name	County	Year Case Accepted	Year Case Closed	Number of Hours	Case Type
CARMICHAEL, V.	CLARK	03	04	4	DR
	CLARK	04	OPEN		DR
COOPER, L.	CLARK	04	04	1	MI
	CLARK	03	04	10	DR
BERTRAND, J.	CLARK	03	04	15	DR
DEATRICK, S.	CLARK	04	OPEN		DR
DESIMONE, J.	CLARK	03	04	17	DR
	CLARK	04	05	26 (IN 04)	DR
FONDRISI, M.	CLARK	04	OPEN		DR
	CLARK	04	OPEN		MI
	CLARK	04	OPEN		DR
FORSEE, M.	CLARK	02	04	15	DR
FOWLER, A.	CLARK	04	OPEN		DR
GILLENWATER, M.	CLARK	02	OPEN		DR
GRAHAM, C.	CLARK	04	OPEN		MI
GRANNAN, J.	CLARK	04	OPEN		DR
Overall total number of volunteer attorneys: 82		Overall total number of cases accepted or pending: 130		Overall total hours on closed cases: 712.5	

Name of Pro Bono Provider (includes legal service provider, court, plan administrator, bar association, and other organizations): LEGAL VOLUNTEERS

IOLTA funding accounts for 54 % of total pro bono provider budget. Please state the percentage of volunteers and cases which are attributable to IOLTA funding 54%. If this percentage is substantially more than the percentage of IOLTA funding, please explain.

Volunteer Attorney Name	County	Year Case Accepted	Year Case Closed	Number of Hours	Case Type
GREEN, G.	CLARK	02	04	12	DR
	CLARK	04	04	1	MI
GREEN, S. (deceased)	CLARK	03	04	1	MI
LEWIS, D.	CLARK	04	04	3	MI
LOCKARD, R.	CLARK	03	OPEN		DR
LOWE, R.T.	CLARK	03	OPEN		DR
	CLARK	04	OPEN		DR
MARRA, D.	CLARK	04	OPEN		DR
MOORE, D.	CLARK	03	OPEN		DR
MOSLEY, D.	CLARK	03	OPEN		MI
SMITH, E.	CLARK	04	04	2	MI
THOMAS, T.	CLARK	04	04	17	DR
VOELKER, S.	CLARK	04	OPEN		DR
WEBER, J.	CLARK	04	OPEN		DR
WILLIAMS, J.	CLARK	04	OPEN		MI
<b>TOTAL: CLARK 24 ATTORNEYS</b>	<b>CASES: 31</b>			<b>CLOSED HOURS: 134</b>	
BIRD, T.	FLOYD	03	OPEN		DR
CONRAD, M.	FLOYD	03	04	5	DR
	FLOYD	04	05	10	DR
CONRAD, K.	FLOYD	03	OPEN		DR
	FLOYD	04	OPEN		DR
COTNER, L.	FLOYD	03	04	15	DR
EICHENBERGER, R.	FLOYD	04	04	2	MI
FOX, R.	FLOYD	04	05	9	DR
GESENHUES, G.	FLOYD	04	OPEN		DR
	FLOYD	03	04	15.5	DR
GLICKFIELD, L.	FLOYD	04	OPEN		DR
GOODWELL, K.	FLOYD	03	04	6	MI
	FLOYD	04	04	8	GU
HAINES, S.	FLOYD	04	04	2	ES
HAMILTON, R.	FLOYD	04	04	1.25	MI

Volunteer Attorney Name	County	Year Case Accepted	Year Case Closed	Number of Hours	Case Type
LOHMEYER, S.	FLOYD	04	04	12.5	DR
LORCH, L.	FLOYD	03	04	10.6	DR
	FLOYD	04	04	16	DR
LOWE, J.	FLOYD	03	OPEN		MI
MATTOX, F.	FLOYD	02	04	5	DR
MOYER, W.	FLOYD	02	04	5	MI
MURPHY, C.	FLOYD	03	OPEN		MI
NAVILLE, M.	FLOYD	04	04	10	GU
NAVILLE, T.	FLOYD	04	04	8.2	GU
NEELY, G.	FLOYD	04	04	1	ES
PALMQUIST, S.	FLOYD	03	04	12.5	DR
	FLOYD	03	04	7.10	GU
	FLOYD	04	04	14	MI
	FLOYD	04	OPEN		DR
PLATT, A.	FLOYD	04	04	1	MI
	FLOYD	04	OPEN		GU
PLATT, C.	FLOYD	03	OPEN		DR
PRICE, G.	FLOYD	04	OPEN		GU
PULLIAM, K.	FLOYD	04	04	5.2	MI
REGER, G.	FLOYD	04	04	1	ES
REGER, L.	FLOYD	04	04	40	DR
	FLOYD	04	05	23.5	DR
	FLOYD	03	04	3	DR
RENFRO, K.	FLOYD	04	04	2	DR
ROBINSON, M.	FLOYD	03	04	2	DR
	FLOYD	04	04	6.5	DR
ROBISON, S.	FLOYD	03	OPEN		DR
	FLOYD	04	OPEN		DR
RUSH, R.	FLOYD	04	OPEN		DR
SCHAD, M.	FLOYD	03	OPEN		DR
	FLOYD	04	OPEN		DR
SINEX, T.	FLOYD	03	OPEN		ES
	FLOYD	04	OPEN		ES
SMITH, W.	FLOYD	03	OPEN		DR
	FLOYD	04	OPEN		DR
STILLER, C.	FLOYD	03	OPEN		DR
STRECKFUS, G.	FLOYD	03	05	3.5	DR
THOMAS, S.	FLOYD	03	05	40	DR
	FLOYD	04	04	25	DR
WARD, M.	FLOYD	04	04	3	GU
	FLOYD	04	OPEN		ES
	FLOYD	04	OPEN		GU
WELCH, L.	FLOYD	03	OPEN		DR
	FLOYD	04	05	11	DR
WILLIAMS, S.	FLOYD	03	04	55	GU
WOODARD, J.	FLOYD	02	OPEN		DR
	FLOYD	03	04	4.25	GU
	FLOYD	04	OPEN		DR
<b>FLOYD TOTALS:</b>		<b>CASES:</b>		<b>401.6</b>	
<b>41 ATTORNEYS</b>		<b>63</b>		<b>CLOSED</b>	
				<b>HOURS</b>	



VOLUNTEER ATTORNEY NAME	COUNTY	YEAR CASE ACCEPTED	YEAR CASE CLOSED	NUMBER OF HOURS	CASE TYPE
AUSTIN, M.	HARRISON	03	04	8.8	DR
	HARRISON	04	04	2	DR
	HARRISON	04	OPEN		DR
FINK, L.	HARRISON	03	04	12	DR
INGLE, G.	HARRISON	04	OPEN		DR
	HARRISON	04	OPEN		DR
SCHULTZ, S.	HARRISON	03	04	15	DR
SWARENS, E.	HARRISON	04	05	8	GU
<b>HARRISON TOTALS: ATTORNEYS: 5</b>		<b>CASES: 8</b>		<b>51.8 CLOSED HOURS</b>	
DIETRICH, JOHN	SCOTT	03	OPEN		MI
	SCOTT	04	04	35	DR
	SCOTT	04	04	1.5	MI
	SCOTT	04	04	2	MI
HOUSTON, R.	SCOTT	03	05	10	MI
	SCOTT	04	04	5.2	DR
THOMPSON, K.	SCOTT	03	OPEN		DR
VANDEWATER, K.	SCOTT	04	OPEN		DR
<b>SCOTT TOTALS: 4 ATTORNEYS</b>		<b>8 CASES</b>		<b>54.7 HR.</b>	
BARTANAN, A.	WASHINGTON	04	OPEN		MI
BRISCOE, D.	WASH	03	OPEN		DR
BROWN, D.	WASH	04	OPEN		DR
HAMILTON, R.	WASH	04	04	5	DR
	WASH	04	OPEN		DR
LEATHERBURY, D.	WASH	03	OPEN		DR
	WASH	04	OPEN		MI
MEAD, J.	WASH	03	OPEN		MI
	WASH	04	OPEN		MI
SCIFRES, T.	WASH	03	04	43.4	DR
	WASH	04	04	2	PO
(Clients of agency for handicapped)	WASH	04	04-05	20	PO
THOMPSON, T.	WASH	03	OPEN		DR
<b>WASHINGTON TOTALS: 8 ATTORNEYS</b>		<b>APPROX. 20 CASES</b>		<b>70.4 CLOSED HRS.</b>	

## 2004 REPORT OF VOLUNTEER ATTORNEY LIMITED INFORMATION ACTIVITY IN DISTRICT 14

This limited legal information chart can include activities such as pro se clinics and call-in or walk-in informational services.

Please attach additional pages for each pro bono provider that receives IOLTA funding, whether directly or indirectly, in your district. See the sample additional pro bono provider page 7A.

Please list each attorney only once in the volunteer attorney column but complete one line for each type of legal information activity for that attorney.

**Name of Pro Bono Provider** (includes legal service provider, court, plan administrator, bar association, and other organizations): LEGAL VOLUNTEERS

Volunteer Attorney Name	County	Type of Activity	Number of Hours
<b>STILLER, CARRIE</b>	<b>FLOYD</b>	<b>Organizing CLE</b>	<b>15</b>
<b>GRAYSON, JONI</b>	<b>CLARK</b>	<b>Organizing CLE</b>	<b>30</b>
<b>SCIFRES, THOMAS</b>	<b>WASH</b>	<b>Coordination of attorneys In Washington County</b>	<b>20</b>
<b>BREngle, JOHN</b>	<b>FLOYD</b>	<b>DEBT COUNSELING</b>	<b>125</b>
<b>ROBINSON, J. MARK</b>	<b>FLOYD</b>	<b>DEBT COUNSELING</b>	<b>135</b>
<b>CONRAD, MARIANNE J.</b>	<b>FLOYD</b>	<b>DEBT COUNSELING</b>	<b>80</b>
<b>TOTAL: 6</b>			<b>TOTAL: 405</b>
<b>OVERALL VOLUNTEER ATTORNEY TOTAL:</b>			<b>OVERALL HOURS TOTAL:</b>

<b>2004 REPORT</b>
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**Please list your District's 2004 activities--including committee meetings, training, attorney recognition, newspaper or magazine articles, marketing and promotion--in chronological order.**

<u><b>Date</b></u>	<u><b>Activity</b></u>
February:	Board meeting
March:	Board meeting
April:	Small committee meeting: preliminary work on advocate training
May:	Wrote article for pro bono insert to the <b>Indiana Lawyer</b>
July:	Board meeting
August:	Conference call w/other administrators on law school initiative (Administrator had hip replacement—out until Mid-September)
October:	CLE planning meeting ISBA meeting & Plan Administrators' retreat/Shepard Dinner
November:	Lunch meeting with Bill Enslen, new ILS Board President, ILS people, and interested attorneys. Board meeting
December:	CLE (all-day), six hours credit  Administrator attended Family Law Training (ILS) in Indianapolis

N.B.: Schedule of board meetings was disrupted by Plan Administrator's surgery, but is not on track in 2005—every other month.

## 2004 REPORT

**Please provide a short summary of how the provision of pro bono service is coordinated in your district, including the intake process, the relationships of pro bono providers in the district, how referrals are made, and how reporting is done.**

Legal Volunteers is the only provider of pro bono services in District 14. Around May 15, 2004, we moved away from the Legal Services office and started an office in a church. Intakes are still sent over from Legal Services, but we have a large number of call-ins; these are frequently referred to Legal Services, but just as frequently sent an application to complete and return. We are not set up for walk-ins and do not encourage them. The local abuse shelter has copies of our application and retainer and also is an intake source. All intakes are reviewed for qualification under our guidelines, and are referred to attorneys willing (and available) to take cases in the areas needed. We do not maintain a waiting list, except we do pend applications from women with short separations from their husbands unless they are in danger. We coordinate with the abuse shelter and sometimes make legal assistance contingent on the clients getting counseling and support help at the Center. This developing relationship is also detailed in an earlier section of this report in plans for 2006.

One issue that will soon be taken up by the LV board is that of our relationship to Legal Services and how we want to use their guidelines, if at all. We have been using their income guidelines as a convenience and because attorneys are accustomed to them. We want to maintain a close relationship with Legal Services, but at the same time, we do not want to become simply off-site staff for them. Because they get a retainer/agreement from the clients before sending the application to LV, the result is that the client then expects to get an attorney, and regardless of the outcome, they have to get some kind of a communication from LV. Thus we have to use time that really isn't there, and precious stamps. We do have our own, much simpler, policies and guidelines, which perhaps need expanding. We also need to make clear to Legal Services the kind of cases there is really no point in sending over. Also, our guidelines state that we will not consider applications for real estate matters, collections, or bankruptcy unless they have been screened first by Legal Services; preferably the bankruptcy clients need to have debt counseling.

**Please describe any special circumstances, including difficulties encountered, affecting your District's 2004 implementation of its plan.**

The pro bono program in District 14 is maturing, and the Plan Administrator is maturing in the job. Since the early time of the program was spent in establishing the infrastructure, which of course has to be maintained, we are being more and more freed to work with the "big picture" necessary for growth. We are still seriously hampered by a board that is very hard to get to meetings, that simply doesn't "get it" that they must be more involved if we are to fulfill our purpose—they apparently do not see this responsibility as a priority in their busy lives. Money is a serious problem, and one that the Plan Administrators have been told is not theirs to solve. But with IOLTA so sparse, and donations so scarce, and nobody willing to do the work for a fundraiser, we are handicapped. The board needs more of the Plan Administrator's attention, but it also needs serious attention from the judicial side.

On the very bright side, we had an excellent and well-attended CLE in December, 2004, with 30+ participants, and a sliding fee scale for those who agreed to take two pro bono cases. Donald Lundberg did the ethics portion of the day, and the other presenters were likewise excellent. They had planned to work with attorneys new to family law (the advertised purpose) but instead were faced with experienced people who wanted another take on various issues. The presenters punted, and all was well. This program turned out to be an accidental fund-raiser; we did not intend to make money on it, but inexpensive, although excellent and convenient, accommodations plus a grant from a local printer for the preparation of our materials helped to make it possible. We gleaned two attorneys new to the pro bono program.

## **Budget Narrative**

Please provide descriptions of the following line items in the foregoing budget chart, by item number, in the space provided.

Lines (A)(1), (2), (3) Please indicate the number of hours per week for each personnel position and rate of pay.

**\_\_ (A)(1) The Plan Administrator is part-time, working at 80% of full-time. Her annual salary is \$25,956, with no benefits. Donated and grant monies supplement the IOLTA money, but that is getting low.**

**(B)(2) There is no paralegal.**

**(C)(3) There are no other persons employed by Legal Volunteers.**

Line (B)(1) Please describe the occupancy cost in terms of square footage, utilities or other amenities and indicate whether the occupancy cost is above or below the market rate for that space.

**Legal Volunteers occupies a small office in a church in New Albany, IN (Floyd County) and pays \$50 each month to cover utilities. The desk and side chairs belong to the church; two filing cabinets belong to Legal Volunteers, and the bookcase, small pedestal file, and the desk chair are the property of the Plan Administrator. We have our own phone line and computer and use the church's fax machine. This cost is well below market value for this type of space.**

<b>ANNUAL TIMETABLE FOR SUBMISSION OF FORMS AND CHECKS:</b>
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January 1:	Checks distributed
July 1:	Annual report, plan and grant application due to IPBC
November:	Notification of awards
<b>December 1:</b>	<b>IBF grant agreement due and revised budget due</b>

# BUDGETS FOR 2004, 2005 AND 2006 *FOR IOLTA FUNDS ONLY*

Cost Category	2004 Actual Ex- penditures	2004 Budget	2005 Actual Expenditures Es- timated	2005 Budget	2006 Budget
<b>A. Personnel Costs</b>					
1. Plan Administrator	\$19,289	\$16,818	\$14,900	\$23,000	\$21,000
2. Paralegals	\$0	\$0	\$0	\$0	\$0
3. Others-Please ex- plain					
4. Employee benefits					
a. Insurance	\$0	\$0	\$0	\$0	\$0
b. Retirement plans	\$0	\$0	\$0	\$0	\$0
c. Other FICA	\$1,476	\$1,287	\$1,140	\$1,760	\$1,607
<b>5. Total Personnel Costs</b>	<b>\$20,765</b>	<b>\$18,105</b>	<b>\$16,040</b>	<b>\$24,760</b>	<b>\$22,607</b>
<b>B. Non-Personnel Costs</b>					
1. Occupancy	\$0	\$0	\$50	\$600	\$400
2. Equipment rental	\$0	\$0	\$0	\$0	\$0
3. Office supplies	\$0	\$0	\$100	\$300	\$243
4. Telephone	\$0	\$0	\$200	\$0	\$700
5. Travel	\$105	\$500	\$25	\$250	\$250
6. Training	\$75	\$300	\$0	\$200	\$50
7. Library	\$0	\$0	\$0	\$0	\$0
8. Malpractice Insurance	\$0	\$900	\$500	\$0	\$800
9. Dues and fees	\$35	\$75	\$10	\$50	\$50
10. Audit	\$0	\$200	\$0	\$0	\$0
11. Contingent reserve	\$300	\$200	\$75	\$500	\$400
12. Litigation reserve	\$0	\$0	\$0	\$0	\$0
13. Marketing and pro- motion	\$0	\$1,000	\$0	\$0	\$0
14. Attorney recognition	\$0	\$0	\$0	\$0	\$0
15. Litigation expenses (includes expert fees)	\$0	\$0	\$0	\$0	\$0
16. Property Acquisition	\$0	\$0	\$0	\$0	\$0
17. Contract Services	\$0	\$0	\$0	\$0	\$0
18. Grants to other pro bono providers	\$0	\$0	\$0	\$0	\$0
19. Other-Please ex- plain				\$0	\$0
<b>20. Total Non- Personnel Costs</b>	<b>\$515</b>	<b>\$3,175</b>	<b>\$960</b>	<b>\$1,900</b>	<b>\$2,893</b>
<b>C. Total Expenditures</b>	<b>\$21,280</b>	<b>\$21,280</b>	<b>\$17,000</b>	<b>\$26,660</b>	<b>\$25,500</b>

IOLTA funds received

2004: **\$21,280.00**

IOLTA funds received

2005: **\$17,000.00**

